PRV – Call Center Internal Credit/Adjustment Request

Purpose:

The objective of this procedure is to correct claims internally due to processing errors. The Customer Service Representative (CSR) determines through a call or correspondence that an internal processing error occurred with the claim in question. The CSR will complete an Internal Credit/Adjustment request through OnBase Client. The adjustment will be reviewed by the Unit Lead then forwarded to the claims processing unit. The corrected transaction will then be finalized.

Identification of Roles:

Quality Assurance (QA) coordinator, Trainer, Lead, Supervisor, Manager

Performance Standards:

Expectation: Worked within 72 hours

Path of Business Procedure:

Step 1: Receive incoming call or written correspondence

Step 2: Internal credit or adjustment needed due to claim processing error, or previous credit adjustment was processed incorrectly

Step 3: CSR signs into OnBase Client
   a. Choose File
   b. Select New
   c. Click Forms
   d. Select Core Internal Credit/Adjustment Request
   e. Click Create

Step 4: Complete "Request Type" for Adjustment
   a. Choose Claim Type "Live"
      1. Fill out last paid Transaction Control Number (TCN), National Provider Identifier (NPI), and Recipient Identification (ID) (Do not copy and paste the information)
      2. On Adjustment/Credit Reason- Choose "20-Claim Error"
      3. In the comments field, state only what needs to be corrected, including line #
      4. Enter the Document Control Number (DCN) or Contact Log number and click "Save"

Step 5: Internal Credit/Adjustment Request is forwarded to Adjustment Queue for review by Unit Lead

Forms/Reports:

Credit/Adjustment Request

RFP References:

6.4.2.3.b

6.4.2.3.c

Interfaces:

OnBase
MMIS
Providers

Attachments:

Process Map

Attachment A:

INTERNAL CREDIT AND ADJUSTMENT REQUEST

CSR

Incoming Call or Correspondence.
1

Adjustment needed due to claim process in error or previous adjustment not process correctly.
2

Sign into OnBase.
3

Complete Request Type for Adjustment.
4

Internal Credit/Adjustment Request forward to queue for review.
5